



Entering Your Company Info and a Few Employees

As one of the first steps in Getting Started, you need to tell PestaRoo a little more about your company.

Home Page Preferences

From Home Page, click on “Preferences” This takes you to a screen where you can type in basic Company Info. After you type in several of these fields, click on the “Home Page” button at the top of the screen. This button appears everywhere in the software. From Home Page Preference you can edit you company info any time you like and it will flow through out the software. The only exception is your company name. This value entered must exactly match the value in your original registration email. To change this value, please contact us.

Staff

From Home Page, click “More” in the bottom right and then click on “Staff”, to go to the Staff table. You will land on a Staff Choose Name screen. Almost all the common files have this type of layout. It lets you quickly find anything without having to learn a code or a customer number. So, in the Customer table the Customer Choose Name screen lets you quickly find Customers. In the Location file, you can quickly find Locations. And in the Staff file, it lets you find Staff. See the pattern?! PestaRoo really is easy to use. We have spent a lot of time designing it to be intuitive. At this point you don't have any staff in your database. So, instead of Choosing or Searching we will put in a few staff persons. If you are still on the Staff Choose Name, click on the button “New”. This creates a new record and takes you to a layout (a screen) where you can type in his or her information. (If you can't create new records, see Installation notes above about write-protected files.) For now, typing in their names is adequate. For each staff who is a technician, also

click on the “Yes” for the Schedule Book. When you are done with the first employee, click on “New” to start another. Notice that you don't need to do a Save. FMP (and so PestaRoo) does this for you in the background. Type in your staff members and/or employees. We will use them for the next step.

Setting Up the Schedule Book Pages

Do you remember the big messy notebooks most of us used to keep track of our technician's schedules? Well, forget all about those scribbled pages, and welcome to Schedule Book, PestaRoo's easy to use scheduling and dispatch system. By going to Staff Choose Name, and marking each staff you choose for the schedule book, they are already there! It is that easy. Schedule Book in PestaRoo automatically sizes itself to the number of staff you have. It places them in the order created. Two staff members are put on each Schedule Book page. To remove a staff from the schedule book, just change their Schedule Book field to “No”. What if you want to precisely control which staff is on which page? (This would normally be used only if you have more turn-over in staff than average.) From Home Page, click on “Preferences” again. This time we will click on the “Schedule Book” tab. Next, set the Schedule Book to “Fixed”. This lets you control who is on which page. Lastly, select each staff for each page. Note that you have to have already created a staff person before you can add it here. When you are done putting technicians in the schedule book pages, return to Home Page.